

Pro Per Ibarra, Miroslava (Pro Per Petitioner, maternal grandmother)

## Petition for Appointment of Guardian of the Person

		<b>TEMPORARY GRANTED ON COURT'S OWN MOTION EXPIRES 7/27/2015</b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
<b>Cont. from 042015, 051815, 062215</b>		<b>MIROSLAVA (MARI) IBARRA</b> , maternal grandmother, is petitioner.	<u><b>Continued from 6/22/2015.</b></u> Minute Order states Ms. Ibarra is to either file a proper proof of service or a consent signed by the mother, Evelyn Chavez. The Court orders that temporary letters issue forthwith. (Note: All issues have been addressed.)
	<b>Aff.Sub.Wit.</b>	Father: <b>ADAM GONZALEZ</b> ; personally served 2/15/2015.	
✓	<b>Verified</b>	Mother: <b>EVELYN CHAVEZ</b> ; consents and waives notice.	
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>	Paternal grandfather: Chevy Jesus Gonzalez; personally served 2/15/2015; served by mail 4/27/2015.	
✓	<b>Notice of Hrg</b>	Paternal grandmother: Deceased.	
✓	<b>Aff.Mail</b>		
	<b>Aff.Pub.</b>	Maternal grandfather: Alfred Chavez; personally served 2/11/2015.	
	<b>Sp.Ntc.</b>	(Note: Maternal grandfather was appointed guardian of siblings Adam and Makayla Gonzalez on 4/17/2006.)	
✓	<b>Pers.Serv.</b>		
✓	<b>Conf. Screen</b>	<b>Petitioner states</b> she has raised the child since she was a week old, and the mother and father have never been a part of the child's life other than weekend visits sometimes. Petitioner states after 11 years of not being in her life full time, the father filed for custody. Petitioner states the child loves her dad but was very happy with the living situation before all this custody happened. Petitioner states the child thinks of her as her mom, and Petitioner states she just wants what is best for the child.	<u><b>Note:</b></u> Notice of Withdrawal by Tohono O'odham Nation was filed 6/8/2015, stating the Tribe requests the Court accept its withdrawal as a party to this matter; however, it wishes to continue receiving copies of pleadings, reports and petitions filed with the Court, and believes the Act continues to apply to this matter [citations omitted.] Proof of Service of the Notice of Hearing by certified mail with return receipt filed 5/15/2015 for Tohono O'odham Nation Tribe.
✓	<b>Letters</b>		
✓	<b>Duties/S</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
✓	<b>CI Report</b>		
✓	<b>Clearances</b>		
✓	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
✓	<b>UCCJEA</b>	<b>Court Investigator Jo Ann Morris' Report</b> was filed on 4/8/2015.	<b>Reviewed by:</b> LEG
	<b>Citation</b>		<b>Reviewed on:</b> 7/23/15
	<b>FTB Notice</b>		<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 1 – Gonzalez</b>

Attorney: Lisa M. Horton (for Conservator Kendra L. Brenson)

## Status Hearing Re: Filing of the Second and Final Account and Proof of Bond

	<b>KENDRA L. BRENSON</b> , sister, was appointed Successor Conservator of the Person and Estate on 8/2/2007. Letters issued on 08/02/2007.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need proof of bond and Letters of Guardianship (Texas term for conservatorship) to be filed with the Court to demonstrate the establishment of the equivalent of a conservatorship in Texas.  2. Need Second and Final account of the conservatorship pursuant to Probate Code § 2620 et seq. or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Cont. from	<b>Order Fixing Residence Outside the State of California filed 6/18/2015</b>	
Aff.Sub.Wit.	authorizes the Conservator to establish the Conservatee's residence in Conroe, Texas.	
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	<b>Minute Order dated 07/07/2015</b> from the <i>Status Hearing Re: Establishment of Conservatorship in Texas</i> set this status hearing for the filing of the Second and Final Account and Proof of Bond, and states Counsel represents that her client was appointed in Texas on 06/18/2015, with bond ordered. The bonding company is currently processing the paper work, and Ms. Horton is awaiting the last bank statement to complete the second and final account.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<b>Reviewed by:</b> LEG
		<b>Reviewed on:</b> 7/23/15
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 2 – Harris</b>

**3 Darnell L. Cook Jr & Tyquil L. Cook (GUARD/P) Case No. 06CEPR00873**

Guardian: Martha R. Walker (pro per)

Petitioner/Mother: Shantia M. Wheeler (pro per)

**Petition for Termination of Guardianship**

		<b>SHANITA M. WHEELER</b> , mother, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>MARTHA WALKER</b> , maternal grandmother, was appointed as guardian of the minors on 06/25/2009.	<b>Continued from 6/22/15. Examiner notes provided in open court. As of 7/22/15 the following issues remain:</b>
<b>Cont. from 062215</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Please see petition for details.	<ol style="list-style-type: none"><li>1. Petition is incomplete. Petitioner does not provide a reason why termination of the guardianship is in the best interest of the minors.</li><li>2. Need Notice of Hearing.</li><li>3. Need proof of service of the Notice of Hearing on:<ol style="list-style-type: none"><li>a. Martha Walker (Maternal Grandmother/Guardian)</li><li>b. Darnell Cook, Sr. (Father)</li><li>c. Darnell Cook, Jr. (Minor)</li><li>d. Tyquil Cook (Minor)</li><li>e. Paternal Grandparents (Not Listed)</li><li>f. Kim Johnson, Sr. (Maternal Grandfather)</li></ol></li></ol>
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>	<b>Court Investigator Samantha Henson's Report filed on 6/16/15.</b>	
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>	<b>Declaration of Guardian, Martha Walker, filed on 7/9/15.</b>	
<input type="checkbox"/>	<b>Notice of Hrg</b>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<b>Aff.Mail</b>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by: KT</b>
			<b>Reviewed on: 7/22/15</b>
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 3 - Cook</b>

**Probate Status Hearing Re: Filing Account**

<b>DOD: 11/06/06</b>		<b>NAGLAA K. ALAMELDIN</b> , sister, was appointed Administrator with full IAEA and bond of \$190,000.00 on <b>01/02/07</b> .	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>NAGLAA K. ALAMELDIN</b> filed a <b>Status Report of Administration of Estate and Petition to Approve First Account</b> on 09/21/10.	<b>1. Need Final Account and Petition for Final Distribution or current written status report</b> pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Cont. from 100412, 113012, 020113, 040513, 060713, 080913, 090613, 110113, 010914, 041014, 081114, 100914, 120114, 011215, 030215, 040615, 042715, 051115, 060115, 062915		The <b>Petition to Approve First Account</b> was continued several times and the Court denied the Petition with leave to Amend on 06/04/12.	
<b>Aff.Sub.Wit.</b>		<b>Minute Order from hearing on 8/6/12</b> set this matter for status regarding filing the account.	
<b>Verified</b>			
<b>Inventory</b>		<b>In June of 2013</b> the attorney reported that the estate is waiting on funds totaling \$69,425.63 from CA State Controller unclaimed property. In addition since there was a minor beneficiary a guardianship of the estate would be needed prior to distribution.	
<b>PTC</b>			
<b>Not.Cred.</b>		<b>Former Status Report filed 8/11/14 states</b> the estate received a check in the amount of \$69,352.97 from the State Controller's office. Administrator states they are in the process of preparing a formal accounting and petition for final distribution in the next 45 days.	
<b>Notice of Hrg</b>			
<b>Aff.Mail</b>			
<b>Aff.Pub.</b>			
<b>Sp.Ntc.</b>			
<b>Pers.Serv.</b>			
<b>Conf. Screen</b>			
<b>Letters</b>			
<b>Duties/Supp</b>			
<b>Objections</b>			
<b>Video Receipt</b>			
<b>CI Report</b>			
<b>9202</b>			
<b>Order</b>			
<b>Aff. Posting</b>			
<b>Status Rpt</b>	X		
<b>UCCJEA</b>			
<b>Citation</b>			
<b>FTB Notice</b>			
		<b>Reviewed by:</b> skc	
		<b>Reviewed on:</b> 7/22/15	
		<b>Updates:</b>	
		<b>Recommendation:</b>	
		<b>File 4 - Alameldin</b>	

Atty Kruthers, Heather (for Public Administrator)

Atty Rackley, Elaine (Pro Per Administrator with Will Annexed)

## Probate Status Hearing for Failure to File a First Account or Petition for Final Distribution

<b>DOD: 9-6-05</b>	<p><b>DORIS ELAINE RACKLEY</b>, Daughter, was appointed as Administrator with Will Annexed with Limited IAEA without bond and Letters issued on 8-28-07.</p> <p>On <b>11-15-13</b>, the Court removed Ms. Rackley and appointed the <b>PUBLIC ADMINISTRATOR</b>.</p> <p><b>Status Report filed 5-28-15 states</b> the final account was almost complete; however, the Public Administrator is working on retrieving documentation regarding an outstanding balance due for prior year taxes to the IRS. It is anticipated that this problem should be resolved sometime in June. Public Administrator requests an additional 60 days.</p> <p><b>Status Report filed 7-22-15 states</b> the PA has been delayed because of an outstanding balance due for prior year taxes to the IRS. The new PA staff reviewed the file in detail and sent information to the CPA. The accountant requested tax return, account, and wage and income transcripts from the IRS, as well as the Inventory and Appraisal. The PA provided all information that she had, but the transcripts must come from the IRS. The CPA estimates it will take one month to resolve the tax issue. <b>It is therefore requested that this status hearing be continued for at least 60 days.</b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. <b>Need petition for final distribution.</b></p> <p><u>Note:</u> The beneficiaries of the estate are Elaine Rackley, Marilyn Hamby, and the Estate of Irene Hamby.</p>
Cont. from 092013, 111513, 022114, 061314, 092914, 033015, 060115		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
	<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 7/22/15</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 5 – Hamby</b></p>	

DOD: 09/01/2012		<p><b>JULIE RAVISCIONI</b>, daughter was appointed Administrator with full IAEA authority without bond on 05/15/2013.</p> <p>Letters issued 05/16/2013</p> <p>Final Inventory and Appraisal filed 11/06/2013 shows an estate valued at \$182,150.00.</p> <p>Minute Order of 05/15/2014 set this status hearing for the filing of the First Account and/or Petition for Final Distribution.</p> <p><b>Former Declaration of Randolph Krbechek Regarding the Status of Action and Request for Continuance filed 02/26/2015</b> states on 01/21/2015, the administrator filed a demurrer to Ms. Dupree's complaint, the demurrer hearing was scheduled for 02/26/2015 in Department of 503 of the Fresno Superior Court. On 02/09/2015, Ms. Dupree filed a First Amended Complaint for Damages in Camber Dupree v. Julie Raviscioni, Administrator, Fresno County Superior Court Case No. 14CECG03809.</p> <p>Mr. Krbechek intends to file another demurrer to the complaint based on the statute of limitations, and has obtained a hearing date of 03/25/2015. Based thereon, Mr. Krbechek respectfully requests the court continue the hearing on this matter until April 2015.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Minute Order of 06/29/2015:</b> Counsel reports that the underlying litigation has been resolved and that there has been full satisfaction of the claim.</p> <p><b>Minute Order of 05/18/2015:</b> Counsel requests 30 days; no appearance is necessary if the petition is filed at least two court days prior.</p> <p><b>Minute Order of 04/13/2015:</b> Counsel advises that the 3<sup>rd</sup> demurrer is set for 05/12/2015.</p> <p><b>Minute Order of 03/02/2015:</b> Counsel Reports that a Demurrer to the First Amended Complaint in case #14CECG03809 is currently set for hearing on 03/25/2015 in Department 503. Matter continued to 04/13/2015 for further status.</p> <p>1. Need First Account or Petition for Final Distribution or <u>current</u> written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Cont. from 071814, 081814, 092214, 111014, 011215, 030215, 051815, 062915			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
Reviewed by: LV			
Reviewed on: 07/22/2015			
Updates:			
Recommendation:			
File 6 – Dupree			

		<b>TOM AVEDESAN and LOUISE AVEDESAN,</b> Co-Trustees, are petitioners.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Account period: 03/28/2014 – 04/15/2015	1. Notice of Hearing was not filed on the Mandatory Judicial Council Notice of Hearing form, thus service is defective. Need proof of service to the following: <ul style="list-style-type: none"> <li>DANIEL KANDARIAN SNT Beneficiary;</li> <li>SUZANNE COOPER, sister;</li> <li>DEPT. OF HEALTH CARE SERVICES;</li> <li>DEPT. OF DEVELOPMENTAL SERVICES;</li> <li>DEPT. OF STATE HOSPITALS.</li> </ul>
<b>Cont. from</b>		Accounting: <b>\$50,365.25</b>	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Beginning POH: <b>\$50,000.00</b>	2. Disbursements include rent fees in the amount of \$4,456.00. Examples of Trust Distributions that will reduce SSI benefits are housing costs. Housing costs are not a permissible distribution from the Special Needs Trust if they reduce other benefits that the beneficiary could be entitled to. Need to provide justification of paying rent from the Special Needs Trust.
<input checked="" type="checkbox"/>	<b>Verified</b>	Ending POH: <b>\$34,456.67</b>	
<input type="checkbox"/>	<b>Inventory</b>	Trustee - <b>not addressed</b>	3. Disbursements include a charge in the amount of \$352.00 for "tires for truck" however the property on hand does not list a truck. Need clarification.
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>	Attorney - <b>\$500.00</b>	4. Need Order.
<input type="checkbox"/>	<b>Notice of Hrg</b>	Cost - <b>\$200.00</b> (filing fee)	
<input type="checkbox"/>	<b>Aff.Mail</b>		<b>Note:</b> If the petition is granted, status hearings will be set as follows: <ul style="list-style-type: none"> <li><b>Monday, July 24, 2017</b> at 9:00 a.m. in Department 303, for the filing of the second account</li> </ul>
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>	<b>Petitioners pray for:</b>	<b>Reviewed by:</b> LV
<input type="checkbox"/>	<b>Pers.Serv.</b>	1. The First Accounting of this special needs trust be approved.	
<input type="checkbox"/>	<b>Conf. Screen</b>	2. Court approve court costs.	<b>Reviewed on:</b> 07/22/2015
<input type="checkbox"/>	<b>Letters</b>	3. For such other and further orders as the court may deem proper.	
<input type="checkbox"/>	<b>Duties/Supp</b>		<b>Updates:</b>
<input type="checkbox"/>	<b>Objections</b>		<b>Recommendation:</b>
<input type="checkbox"/>	<b>Video Receipt</b>		<b>File 7 – Kandarian</b>
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		

**9 Beverly Stocchetti (Estate) Case No. 15CEPR00039****Attorney Weare, Heather M (of Santa Maria, California for John Parker – Executor)****Probate Status Hearing Re: Filing of the Inventory and Appraisal**

<b>DOD: 09/09/2014</b>	<b>JOHN PARKER</b> , friend, was appointed Executor with full IAEA without bond on 03/30/2015.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Inventory and Appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
	Letters issued on 03/30/2015.	
<b>Cont. from</b>	Inventory and Appraisal Partial No. 1 was filed 05/14/2015 showing an estate valued at \$20,000.00.	
<b>Aff.Sub.Wit.</b>		
<b>Verified</b>		
<b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>	Inventory and Appraisal Partial No. 2 was filed on 06/02/2015 showing an estate valued at \$507,200.00.	
<b>Notice of Hrg</b>		
<b>Aff.Mail</b>	Minute Order of 03/30/2015 set this status hearing for the filing of the final Inventory and Appraisal.	
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
<b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> LV
		<b>Reviewed on:</b> 07/21/2015
		<b>Updates:</b>
		<b>Recommendation:</b>
		<b>File 9 – Stocchetti</b>



**10                    Anahi Escobar-Loza, Leslie Escobar-Loza, Stephanie Escobar-Loza,  
Yvette Escobar-Loza, Victor Escobar-Loza, Victoria Escobar-Loza (GUARD/P)  
Case No. 15CEPR00192**

**Attorney            Jimenez, Miguel (for Maria Isabel Loza Cervantes – Maternal Grandmother – Petitioner)**

**Petition for Appointment of Guardian of the Person (Prob. C. 1510)**

			See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  Continued from 5/4/15.  1. Need revised order and letters, which should both list each child by his or her full legal name, rather than just the first names with a collective last name.
Cont. from 050415				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order	X		
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 7/22/15	
			Updates:	
			Recommendation:	
			File 10 – Escobar-Loza	

**Lisa Love Rodriguez, Marcelo Eric Rodriguez, and  
Lorenzo Garcia Rodriguez (GUARD/P) Case No. 15CEPR00258**

Petitioner Rebecca Rodriguez (Pro Per – Paternal Grandmother – Petitioner)  
Petitioner Pablo Rodriguez, Jr. (Pro Per – Paternal Step-Grandfather – Petitioner)

**Petition for Appointment of Guardian of the Person (Prob. C. 1510)**

			See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Minute Order 6/22/15:</b> Felicia Garcia again requests continuance in order to obtain counsel. The Court orders that any objections are to be filed by 7/13/15 or the Court may move forward.  As of 7/22/15, no objection has been filed.  The following remains noted:  1. If diligence is not found, need notice to Maternal Grandfather Ricardo Garcia per Probate Code §1511.
Cont from 051815, 062215				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 7/22/15	
			Updates:	
			Recommendation:	
			File 11 - Rodriguez	

## Probate Status Hearing

**RE: Amended Petition**

			<div>NEEDS/PROBLEMS/COMMENTS:</div> <div><b><u>OFF CALENDAR</u></b></div> <div>Order signed ex parte 7/13/15</div>
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 7/22/15
			Updates:
			Recommendation:
			File 12 – Furlow

**13 Priscilla Vasquez, Daniel Vasquez (GUARD/P) Case No. 15CEPR00399**Petitioner **Maria Isabel Vasquez (Pro Per – Maternal Grandmother – Petitioner)****Petition for Appointment of Guardian of the Person (Prob. Code §1510)**

See petition for details.			<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. If diligence is not found, need proof of personal service of Notice of Hearing with a copy of the petition per Probate Code §1511 on the father Javier Valdez and the paternal grandparents.
Cont from 061515			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	X	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		

Reviewed by: skc
Reviewed on: 7/22/15
Updates:
Recommendation:
File 13 - Vasquez

Petitioner

Melva Palms (Pro Per – Non-relative – Petitioner)

Petition for Appointment of Guardian of the Person (Prob. Code §1510)

See petition for details.			NEEDS/PROBLEMS/COMMENTS:
Cont. from 061515			<u>Minute Order 6/15/15</u> : Examiner Notes provided in open court.
	Aff.Sub.Wit.		The following issues remain:
✓	Verified		1. Need Notice of Hearing.
	Inventory		2. Need proof of personal service of Notice of Hearing with a copy of the petition per Probate Code §1511 at least 15 days prior to the hearing or consent and waiver of notice on:
	PTC		- Thurman Ligon (Father)
	Not.Cred.		- Laquandra Kinchen Ligon (Mother)
	Notice of Hrg	X	3. Need proof of service of Notice of Hearing with a copy of the petition per Probate Code §1511 at least 15 days prior to the hearing or consent and waiver of notice or declaration of due diligence on:
	Aff.Mail	X	- Paternal Grandmother
	Aff.Pub.		- Maternal Grandfather Nick Kinchen
	Sp.Ntc.		- Maternal Grandmother Cassandra Miles
	Pers.Serv.	X	- Siblings age 12 or older
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	DSS Report	X	Reviewed by: skc
	Clearances	X	Reviewed on: 7/22/15
✓	Order		Updates:
			Recommendation:
	Aff. Posting		File 14 - Ligon
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		

## Petition to Determine Succession to Real Property.

<b>DOD: 2/10/15</b>	<b>BRUCE T. JONES</b> , brother, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	40 days since DOD.	<b>OFF CALENDAR.</b> Amended petition filed and set for hearing on 9/1/15.
	No other proceedings.	
<b>Cont. from 060115, 062915</b>	Will dated: 3/18/05 devises entire estate to Bruce T. Jones.	
<input type="checkbox"/> Aff.Sub.Wit.	I & A - <b>\$115,000.00</b>	
<input checked="" type="checkbox"/> Verified		
<input checked="" type="checkbox"/> Inventory		
<input checked="" type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg	<b>Petitioner requests</b> Court determination that Decedent's 100% interest in real property located at 513 W. Cortland in Fresno passes to him pursuant to Decedent's Will.	
<input checked="" type="checkbox"/> Aff.Mail	W/	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		<b>Reviewed by: KT</b>
<input type="checkbox"/> Status Rpt		<b>Reviewed on: 7/22/15</b>
<input type="checkbox"/> UCCJEA		<b>Updates:</b>
<input type="checkbox"/> Citation		<b>Recommendation:</b>
<input type="checkbox"/> FTB Notice		<b>File 15 – Jones</b>

## Petition Instructing the Trustee

		<b>MICHAEL MEHLING</b> , Successor Trustee of the Ostergaard Family Trust, is petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Order. Local Rule 7.1 states a proposed Order shall be submitted with all pleadings that request relief. If the proposed order is not received in the Probate Filing Clerk's Office ten (10) days before the scheduled hearing, a continuance may be required.
<b>Cont. from 061615</b>		Petitioner states on 3/13/03, <b>CARL E. OSTERGAARD</b> and <b>LAVERNA F. OSTERGAARD</b> , husband and wife, as settlors, executed an inter vivos trust known as <b>THE OSTERGAARD FAMILY TRUST</b> (the "Trust").	
	<b>Aff.Sub.Wit.</b>		
✓	<b>Verified</b>		
	<b>Inventory</b>		
	<b>PTC</b>		
	<b>Not.Cred.</b>		
✓	<b>Notice of Hrg</b>		
✓	<b>Aff.Mail</b>	W/	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>		
	<b>Letters</b>		
	<b>Duties/Supp</b>		
	<b>Objections</b>		
	<b>Video Receipt</b>		
	<b>CI Report</b>		
	<b>9202</b>		
	<b>Order</b>	X	
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
	<b>FTB Notice</b>		
<b>Please see additional page</b>			<b>Reviewed by: KT</b> <b>Reviewed on: 7/22/15</b> <b>Updates:</b> <b>Recommendation:</b> <b>File 16 - Ostergarrrd</b>

**KARLENE L. STEFANI** and some of her children treated Laverna's assets and real estate as if the assets belonged to them. Karlene's son, **DRAKE STEFANI** moved into Laverna's residence in late 2013 with his girlfriend and infant child, did not maintain the property, and allowed filth and trash to accumulate while Laverna was in the hospital. Petitioner was required in March 2013 (sic) to file an unlawful detainer action against Drake because Laverna was ready to return home. Drake refused to leave claiming the untenable position that because he was a contingent beneficiary of the trust, that he was entitled to current occupancy of the property. Drake's actions in maintaining possession of the property were supported by his parents, including his mother Karlene Stefani.

During the time immediately after Petitioner took over as trustee and continuing more or less until the present time, Settlor's two children, **KARLENE L. STEFANI** and **LINDA K. OSTERGAARD** were engaged in almost continual conflict and fighting over who would be permitted to live in Laverna's residence, who would receive which personal property, and multiple other issues. Petitioner states he was required to be involved as referee to resolve literally dozens of conflicts.

Upon the death of Laverna, the First Amendment to the trust provided that all personal items were to be divided equally between Settlor's two children, **KARLENE L. STEFANI** and **LINDA K. OSTERGAARD**. The remaining balance of the trust estate was to be distributed 25% in trust for **KARLENE L. STEFANI**, 50% in trust for **LINDA K. OSTERGAARD**, and 25% in trust for the children of **KARLENE L. STEFANI**, whose names are **DRAKE STEFANI**, **DARIEN STEFANI** and **BRIEANN STEFANI**, all of whom are adults. The trust provide that the assets were to be held in trust and distributed ratably over five years with distributions on each of the anniversary dates of Laverna's death.

The assets of the trust consists of real property comprising a family compound with several houses including Settlor's residence on five contiguous lots located at the corner of Brawley and Whitesbridge in Fresno. The five parcels were valued at \$455,000.00. The trust also includes bank accounts valued at \$250,000.00 and an IRA with a balance of approximately \$580,000.00 which is payable to the trust.

Attorney Michael M. Buettner drafted the original trust and the first amendment thereto and had a number of conversations with the settlors regarding their intent over the years. Carl and Laverna told Mr. Buettner that they did not want either of their children to be successor trustee of the trust because they did not trust them with money. They expressed disappointment that their children were not and had never been self-sufficient, and had constantly depended on Carl and Laverna for financial assistance. They expressed desire that the assets be distributed over five years so that they would not be able to squander it all at once. Attorney Michael Buettner asked settlors whether it would be acceptable for the trustee to sell the real property after they both died, or whether, alternatively, they wanted the real property held for the benefit of the family. They responded that the believed it would be helpful to sell the property to provide cash to support the children and grandchildren and that it was not necessary to retain the real property upon their passing.



Petitioner has made it clear to all the beneficiaries from the time of Laverna's death that his intent has been to sell the real property.

On 3/16/15, the beneficiaries of the trust sent notice to the Petitioner and his attorney indicating that the beneficiaries objected to the sale of the real property and demanded to have it distributed to them, presumably in undivided interests, so that they could set up a "limited liability corporation" (sic), owed by the beneficiaries of the trust.

Petitioner's attorney responded objecting to the proposal to distribute the property on the basis that: (1) the assets are to be distributed over five years and the trustee cannot distribute all of the property to the beneficiaries because it would violate the terms of the trust (2) that distributing property to the beneficiaries in undivided interests would be inadvisable because the beneficiaries did not get along, and (3) distributing the property in undivided interests would inevitably result in the trustee retaining interests in the property pending final distribution, and that owning the property jointly with these beneficiaries would subject the trustee to too much liability.

Petitioner alleges that **DARIEN STEFANI**, one of the Settlor's grandsons, procured an audio recording of a conversation he allegedly had with Laverna shortly before the time of her death (and during the time when she was unable to care for her own financial affairs or personal care, as expressed by her physician), during which conversation Laverna allegedly expressed her desire that the real property be retained by the family, not sold. Petitioner alleges that if Laverna made such statements, they were the result of coercion and undue influence on the part of Karlene Stefani and her children.

On 4/8/15, **KATHY OSTERGAARD** (settlor's daughter, called Linda K. Ostergaard in the trust) signed a statement which provides in part, the following: "The complaint of March 16, 2015 re: Proposed Real Estate actions by the Trustee by all of the mentioned beneficiaries, was and is not my desire or intention. I was wrongly pressured into signing this agreement."

Petitioner believes that it would be advisable to sell the real property given the terms of the trust, the expressed wishes of Carl and Laverna, the conflicts among the beneficiaries, and the equivocation of **LINDA K. OSTERGAARD** regarding her wishes.

**Wherefore, Petitioner prays for an Order:**

1. Authorizing and directing Petitioner as Trustee to list the properties described in Exhibit "I" of the petition for sale with a broker selected by Petitioner, sell the properties for a price upon terms which the Trustee deems to be in the best interest of the trust and the beneficiaries which is consistent with Petitioner's fiduciary duties.

Petition for Compensation (Prob. Code §1470)

			<p><b>J. STANLEY TEIXEIRA</b> is Petitioner.</p> <p>Petitioner was court appointed to represent the proposed Conservatee on 5/15/15.</p> <p>On 6/11/15, Sylvia Tuttle-Martinez, spouse, withdrew her petition for conservatorship and the Court dismissed the entire action.</p> <p>Petitioner asks that he be paid \$935.00 for 3.4 attorney hours @ \$275/hr plus \$435 for the filing fee for this petition for a total of \$1,370.00.</p> <p>Services include visiting the proposed Conservatee, investigating his needs, for care, assistance, protection, and the most suitable legal and other procedures to meet those needs, consulting with others concerned for the Conservatee, investigating alternatives to conservatorship, and appearance at the hearing.</p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p>1. <b>Petitioner does not include information regarding the ability of the former proposed Conservatee to pay all or a portion of the sum, which information is necessary for a court determination pursuant to Probate Code §1472(a)(1).</b></p>
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	w		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			<p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 7/23/15</p> <p><b>Updates:</b> 7/24/15</p> <p><b>Recommendation:</b></p> <p><b>File 17 – Martinez</b></p>	

**18 Jaden Ledesma, Paige Ledesma, Audrina Espana (GUARD/P)****Case No. 15CEPR00534**

Petitioner Montijo, Victor Manuel (Pro Per – Maternal Grandparents)

Petitioner Montijo, Mary (Pro Per – Maternal Grandparents)

**Petition for Appointment of Guardianship of the Person**

<b>TEMPORARY EXPIRES 07/27/2015</b>			<b>NEEDS/PROBLEMS/ COMMENTS:</b>
<b>VICTOR MANUEL MONTIJO, and MARY MONTIJO,</b> maternal grandparents, are petitioners.			<b>1. Need Notice of Hearing.</b>  <b>2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:</b> <ul style="list-style-type: none"><li>Lorraine Espana (Paternal Grandmother)</li></ul>
<b><u>Please see Petition for details.</u></b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>	x	
<input type="checkbox"/>	<b>Aff.Mail</b>	x	
<input type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>	n/a	
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input checked="" type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input checked="" type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> LV
			<b>Reviewed on:</b> 07/21/2015
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 18 – Ledesma &amp; Espana</b>

Petitioner Lopez, Maria R. (Pro Per – Petitioner – Maternal Aunt)

## Petition for Appointment of Guardianship of the Person

		<b><u>NO TEMPORARY REQUESTED</u></b>	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		<b>MARIA LOPEZ</b> , maternal aunt, is petitioner.	1. Need Notice of Hearing.
		<b><u>Please see petition for details</u></b>	2. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> <li>Cesar Ventura (Father) – Unless the Court dispenses with notice</li> </ul> <b>Note:</b> Declaration of Due Diligence filed 05/26/2015 states last contact with this person was April 1999.
<b>Cont. from</b>			3. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> <li>Paternal Grandparents (Not Listed)</li> <li>Rebecca Michel (Maternal Grandmother)</li> </ul>
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<b>Verified</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Inventory</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>PTC</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Not.Cred.</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Notice of Hrg</b>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<b>Aff.Mail</b>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<b>Aff.Pub.</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Sp.Ntc.</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Pers.Serv.</b>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	<b>Conf. Screen</b>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<b>Letters</b>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Objections</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Video Receipt</b>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<b>CI Report</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>9202</b>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<b>Order</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Aff. Posting</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Status Rpt</b>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<b>UCCJEA</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>Citation</b>	<input type="checkbox"/>	
<input type="checkbox"/>	<b>FTB Notice</b>	<input type="checkbox"/>	
			<b>Reviewed by:</b> LV
			<b>Reviewed on:</b> 07/23/2015
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File 19 – Lopez</b>

<b>DOD: 03/26/07</b>		<b>THERESA FINGER</b> , daughter, is Petitioner and requests appointment as Special Administrator without bond.  All heirs waive bond.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  See Page 21 for related Petition to Determine Succession.
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b>	n/a	<b>Petitioner requests</b> appointment as Special Administrator for to serve as personal representative if decedent's estate in a Petition to Determine Succession in the estate of Clara Galvan Aguilar, decedent's pre-deceased mother.  All heirs waive notice of hearing.  Decedent died intestate.
<input type="checkbox"/>	<b>Aff.Mail</b>	n/a	
<input type="checkbox"/>	<b>Aff.Pub.</b>	n/a	
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> JF
			<b>Reviewed on:</b> 07/23/15
			<b>Updates:</b>
			<b>Recommendation:</b>
			<b>File</b> 20 – Aguilar

DOD: 07/11/99		<b>ALFREDO GALVAN AGUILAR</b> , son, <b>ROSA GALVAN AGUILAR</b> , daughter, and <b>THERESA FINGER as Special Administrator of the Estate of RICHARD GALVAN AGUILAR</b> , son, are Petitioners.  40 days since DOD.  No other proceedings.  I & A                      -                      \$8,750.00  Decedent died intestate.  Petitioners request Court determination that decedent's 25% interest in real property located at 36944 Orange Street, Huron, CA pass to them pursuant to intestate succession.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. The Petition indicates at item 9(a)(2) that the decedent had a deceased spouse. Need name and date of death of deceased spouse pursuant to Local Rule 7.1.1D.	
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input checked="" type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w/o
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: JF Reviewed on: 07/23/15 Updates: Recommendation: File 21 – Aguilar	

Attorney

Teixeira, J. Stanley (for Petitioners Christine Nicolulis and Leslie Rogebregt)

Petition for Order Confirming Trust Assets (Prob. Code §850(a)(3))

<b>DOD: 1/9/15</b>		<b>CHRISTINE NICOLULIS and LESLIE ROGEBREGT</b> , Successor Co-Trustees, are Petitioners.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Petitioners state Schedule A of the Trust evidences the intent of the settlor to transfer certain real property in Clovis to the trust, which was her residence at the time of execution. A deed was recorded 11/12/14. The legal description provided was:	
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	Lot 61, as shown on the Map entitled "TRACT NO. 2175, SQUAW VALLEY RANCHOS NO. 2," filed for record in Book 23 of Maps, Pages 100 to 107. APN 560-316-04	
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>	The trust transfer deed was prepared from a copy of a deed recorded on 6/29/07, which identifies the real property as APN 560-316-04, the same APN as the residence.	
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>	An Affidavit of Change of Trustee was recorded 2/5/15. Several weeks later, Peititoners were notified by the Fresno County Recorder's office that the legal description contained in that instrument was incorrect for the APN. A correct legal description was provided as follows:	
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	Parcel 1: City of Clovis Lot 40 of Tract No. 5118, according to the Map thereof recorded in Volume 69, Pages 30 and 31, of Plats, Fresno County Records. Parcel 2: A side yard easement over the East 4 feet of Lot 39 of said Tract No. 5118, as defined in Section 143.4(d) of the Declaration of Covenants, Conditions & Restrictions for The European Parc, recorded March 8, 2004, as Document No. 2004-0050446, Fresno County Official Records and Supplementary Declaration recorded June 2, 2004, as Document No. 0121575.	
	<b>w/o</b>		
<input type="checkbox"/>	<b>Aff.Pub.</b>	Petitioners have discovered that the legal description used for the trust transfer deed was actually for a property of the settlor's predeceased husband, which she had sold prior to executing the trust. Had the settlor or recorder noticed the discrepancy used for the trust transfer deed while she was living, she could have executed a corrector deed so that the legal description and APN would coincide.	
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>	Petitioners pray for an order of this court that the real property which is the subject of this petition, with the correct legal description, is an asset subject to the management and control of Petitioners as Successor Co-Trustees of the trust, and such further orders as the Court deems proper.	
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input type="checkbox"/>	<b>Letters</b>		
<input type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		

Reviewed by: skc

Reviewed on:  
7/23/15

Updates:

Recommendation:

File  
22 – Bororques

# 23 Kenneth Ralph Barger (Estate)

Case No. 15CEPR00447

Petitioner Kenneth Eugene Barger (Pro Per Petitioner, son)

## Petition for Probate of Will and for Letters Testamentary

<b>DOD: 4/9/2015</b>		<b>KENNETH RALPH BARGER</b> , son and named Executor without bond, is Petitioner.  Full IAEA: OK  Will Dated: 3/25/2015  Residence: Fresno  Publication: Business Journal	<b>NEEDS/PROBLEMS/COMMENTS:</b>  <b>Continued from 7/13/2015.</b> Minute Order states examiner notes provided in open court.  <b>Note for background:</b> Minute Order dated 6/8/2015 states examiner notes are handed to Mr. Barger in open court. Mr. Barger is admonished not to sell any property before the Court approves the petition.  1. Item 8 of the copy of the <i>Petition</i> attached to the <i>Declaration</i> filed on 7/13/2015 does not indicate whether Decedent had issue of a predeceased child, namely whether <b>WILLIAM EUGENE BARGER</b> , adopted son, and <b>JOHN THOMAS BARGER</b> , adopted son, had children who survived the Decedent.  <b>Note:</b> If <i>Petition</i> is granted, Court will set Status Hearings as follows: <ul style="list-style-type: none"> <li>Thursday, January 14, 2016 at 9:00 a.m. in Dept. 303 for the filing of final inventory and appraisal; and</li> <li>Tuesday, September 13, 2016 at 9:00 a.m. in Dept. 303 for the filing of first account and/or petition for final distribution.</li> </ul> Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.
<b>Cont. from 060815, 071315</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>		
<input checked="" type="checkbox"/>	<b>Verified</b>		
<input type="checkbox"/>	<b>Inventory</b>		
<input type="checkbox"/>	<b>PTC</b>		
<input type="checkbox"/>	<b>Not.Cred.</b>		
<input type="checkbox"/>	<b>Notice of Hrg</b> N/A		
<input type="checkbox"/>	<b>Aff.Mail</b>	<b>Estimated value of the Estate:</b> Real property - \$300,000.00 Personal property - \$ 500.00 Total - \$300,500.00  Probate Referee: Rick Smith	
<input checked="" type="checkbox"/>	<b>Aff.Pub.</b>		
<input type="checkbox"/>	<b>Sp.Ntc.</b>		
<input type="checkbox"/>	<b>Pers.Serv.</b>		
<input type="checkbox"/>	<b>Conf. Screen</b>		
<input checked="" type="checkbox"/>	<b>Letters</b>		
<input checked="" type="checkbox"/>	<b>Duties/Supp</b>		
<input type="checkbox"/>	<b>Objections</b>		
<input type="checkbox"/>	<b>Video Receipt</b>		
<input type="checkbox"/>	<b>CI Report</b>		
<input type="checkbox"/>	<b>9202</b>	<b>Reviewed by:</b> LEG <b>Reviewed on:</b> 7/23/15 <b>Updates:</b> <b>Recommendation:</b> <b>File 23 – Barger</b>	
<input checked="" type="checkbox"/>	<b>Order</b>		
<input type="checkbox"/>	<b>Aff. Posting</b>		
<input type="checkbox"/>	<b>Status Rpt</b>		
<input type="checkbox"/>	<b>UCCJEA</b>		
<input type="checkbox"/>	<b>Citation</b>		
<input type="checkbox"/>	<b>FTB Notice</b>		



**Petition to Determine Succession to Real Property (Prob. C. 13151)**

<b>DOD: 2-2-14</b>	<b>RUTH ORONA</b> , Daughter, is Petitioner	<b>NEEDS/PROBLEMS/COMMENTS:</b>
	40 days since DOD	
	I&A: \$100,000.00 (residential real property in Fresno)	
<b>Cont. from 071315</b>	Petitioner states the original I&A was attached to the original petition, which was denied. Petitioner provides a copy of that I&A and requests that the Court take judicial notice of the original I&A.	
✓ <b>Aff.Sub.Wit.</b>		
✓ <b>Verified</b>		
✓ <b>Inventory</b>		
<b>PTC</b>		
<b>Not.Cred.</b>		
✓ <b>Notice of Hrg</b>		
✓ <b>Aff.Mail</b>	W	
<b>Aff.Pub.</b>		
<b>Sp.Ntc.</b>		
<b>Pers.Serv.</b>		
<b>Conf. Screen</b>		
<b>Letters</b>		
<b>Duties/Supp</b>		
<b>Objections</b>		
<b>Video Receipt</b>		
<b>CI Report</b>		
<b>9202</b>		
✓ <b>Order</b>		
<b>Aff. Posting</b>		
<b>Status Rpt</b>		
<b>UCCJEA</b>		
<b>Citation</b>		
<b>FTB Notice</b>		
		<b>Reviewed by:</b> skc
		<b>Reviewed on:</b> 7/22/15
		<b>Updates:</b>
		<b>Recommendation:</b> SUBMITTED
		<b>File 24 - Bernal</b>

			See petition for details.	<b>NEEDS/PROBLEMS/COMMENTS:</b>  1. Need Confidential Guardian Screening Form GC-212 for each proposed guardian.  2. Need Notice of Hearing.  3. Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing pursuant to Probate Code §2250(e) <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence for both parents: - Ramon Castro (Father) - Nicole Hinojosa (Mother)  4. Court records indicate a presently pending Family Court matter. Petitioners may wish to seek joinder in the family law proceeding and request relief from that court pursuant to Local Rule 7.15.7.
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg	X		
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.	X		
	Conf. Screen	X		
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 7/23/15	
			Updates:	
			Recommendation:	
			File 25 – Hinojosa	

**26 Reyonna Crouch, Thomas Mannion, and  
Daniel Mannion-Moberg (GUARD/P)**

**Case No. 15CEPR00681**

Petitioner Mannion, Emma (Pro Per – Petitioner – Maternal Grandmother)

Petition for Appointment of Temporary Guardianship of the Person

Reyonna Age: 14	<p align="center"><b><u>GENERAL HEARING 09/14/2015</u></b></p> <p><b>EMMA MANNION</b>, maternal grandmother, is petitioner.</p> <p align="center"><b><u>Please see petition for details</u></b></p>	<p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <ol style="list-style-type: none"> <li>1. Need Notice of Hearing.</li> <li>2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> <li>• William Scott Hollis (Father of Thomas)</li> <li>• Varlee Moberg (Father of Daniel)</li> <li>• Kellie Mannion (Mother)</li> <li>• Reyonna Crouch (Minor)</li> </ul> </li> </ol>	
Thomas Age: 11			
Daniel Age: 5			
Cont. from			
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input type="checkbox"/> Notice of Hrg			x
<input type="checkbox"/> Aff.Mail			
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			x
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input checked="" type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
<p><b>Reviewed by:</b> LV</p> <p><b>Reviewed on:</b> 07/23/2015</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 26 – Crough/Mannion</b></p>			

Attorney Lucich, Jr., Nicholas L. (for Petitioner Joel M. Joyner, Executor)

First and Final Report of Administrator on Waiver of Account and Petition  
for Allowance of Statutory Attorney's Fees and for Final Distribution

<b>DOD: 11/12/2014</b>		<b>JOEL M. JOYNER</b> , spouse and Executor, is Petitioner.	<b>NEEDS/PROBLEMS/COMMENTS:</b>
		Accounting is waived.	
<b>Cont. from</b>			
<input type="checkbox"/>	<b>Aff.Sub.Wit.</b>	I & A — <b>\$276,000.00</b>	
<input type="checkbox"/>	<b>Verified</b>	POH — <b>\$276,000.00</b> (no cash)	
<input checked="" type="checkbox"/>	<b>Inventory</b>	Executor — <b>waives</b>	
<input checked="" type="checkbox"/>	<b>PTC</b>	Attorney — <b>\$8,520.00</b> (statutory; to be paid from funds advanced into the estate by Joel M. Joyner;)	
<input checked="" type="checkbox"/>	<b>Not.Cred.</b>		
<input checked="" type="checkbox"/>	<b>Notice of Hrg</b>		
<input checked="" type="checkbox"/>	<b>Aff.Mail</b>	Costs — <b>\$1,730.00</b> (filing fees, probate referee, publication, certified copies, recording fees; to be paid from funds advanced into the estate by Joel M. Joyner;)	
	<b>Aff.Pub.</b>		
	<b>Sp.Ntc.</b>		
	<b>Pers.Serv.</b>		
	<b>Conf. Screen</b>	Closing — <b>\$1,000.00</b> (to be paid from funds advanced into the estate by Joel M. Joyner;)	
	<b>Letters</b> 012715		
	<b>Duties/Supp</b>	<b>Distribution pursuant to intestate succession and Agreement Re Distribution of Estate is to:</b>	
	<b>Objections</b>	<ul style="list-style-type: none"> <li>• <b>JOEL M. JOYNER</b> – entire interest in real property on Nees, and pick-up truck;</li> <li>• <b>MARCI R. CHURCH</b> – entire interest in real property on DeWitt, and cash of <b>\$15,993.84</b> to be paid from funds advanced into the estate by Joel M. Joyner.</li> </ul>	
	<b>Video Receipt</b>		
	<b>CI Report</b>		
<input checked="" type="checkbox"/>	<b>9202</b>		
<input checked="" type="checkbox"/>	<b>Order</b>		
	<b>Aff. Posting</b>		
	<b>Status Rpt</b>		
	<b>UCCJEA</b>		
	<b>Citation</b>		
<input checked="" type="checkbox"/>	<b>FTB Notice</b>		
			<b>Reviewed by:</b> LEG
			<b>Reviewed on:</b> 7/23/15
			<b>Updates:</b>
			<b>Recommendation:</b> SUBMITTED
			<b>File</b> 8 – Ferring